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## **ADDENDUM NO. 1**

**Date of Addendum: 20 Oct 11**  
**Request For Proposals (RFP) No. 12-0203**

### **HOMEBUYER SERVICES**

It is the vendor's responsibility to ensure their receipt of all addenda, and to clearly acknowledge all addenda within their initial bid or proposal response. Acknowledgement may be confirmed either by inclusion of a signed copy of this addendum with the initial bid or proposal response, or by completion and return of the addendum acknowledgement section of the solicitation. Failure to acknowledge each addendum may prevent the bid or proposal from being considered for award.

This addendum \_\_\_ does X does not change the date for receipt of bids or proposals.

The purpose of this addendum is to provide notes from the pre-proposal conference, and further information, to all potential responding vendors. The conference notes are attached hereto and reflect information provided during the course of that meeting. Also attached is the sign-in sheet for the pre-proposal conference and a revised Scope of Work part 2 confirming various changes from the original scope of work included in Section 2 of the RFP. No changes other than the information so noted in this addendum and its attachments constitute an approved change to the RFP.

Firm Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Title: \_\_\_\_\_

Typed/Printed Name: \_\_\_\_\_

Notes: Recommended Pre-Proposal Meeting, 18 Oct 11, RFP 12-0203, Homebuyer Services

The subject meeting commenced at 2:00 PM as scheduled within the County Administration Building. Sign-in sheets were passed out with comment that this was a recommended rather than a mandatory meeting.

The contents of the Request for Proposals (RFP) were summarized with specific notice provided in regards to the following matters:

- Term of contract
- Proposal response format
- Confirmation of County-specified pricing
- Timeliness of response

Questions and answers that arose during the course of the conference are summarized as follows:

1. There was a considerable degree of discussion regarding the required frequency of “home buyer” and “home maintenance” class sessions. It was determined to amend the scope of the RFP to state that a minimum of eight homebuyer classes involving 6 hours of instruction each were to be provided each year with each such session to include a “home maintenance “ module involving 5 hours of instruction.
2. It was confirmed that there would be participants attending the maintenance modules that would not be involved with home purchase, and that awarded vendors would receive remuneration for these participants on the separate payment basis stated in the RFP. It was confirmed that such participants would be specifically identified by specific referrals.
3. It was confirmed that awarded vendor could not provide training to participants seeking to purchase homes owned by the awarded vendor.
4. A question was raised regarding potential participation by the City of Leesburg. It was pointed out that the pre-proposal meeting was not mandatory and there could be participants other than those attending the meeting.
5. There was a question regarding the number of program participants over the last year. A specific total number was not identified.

There were no further comments and the meeting ended at 3:00 PM.

# LAKE COUNTY OFFICE OF PROCUREMENT SERVICES SIGN-IN SHEET

Project Title:

Homebuyer Services

Opening Date: November 2, 2011 3:00 pm

Project Number:

12-0203

Pre-Proposal Date: October 18, 2011 2:00 pm

Purpose of Meeting:

Pre-Proposal

C.O.: Barnett Schwartzman

NAME	COMPANY NAME	ADDRESS	PHONE/FAX	E-MAIL
Jim Frisch	HFHLS	8050x186575		James@hnhit.com
Geri Taylor	AHBL	P.O. Box 1629 Eustis		geritaylor@comcast.net
Ben Ardito	Mortgage Financial	725 E ALFRED TAVARE		Ben@mcgendo.com
Amy Bolt	1st National Bank	P.O. Box 95 Mount Dora, FL 32754	383-2111	Amy.bolt@fnbmed.com
Barbara Cosden	SunTrust	15375 US Hwy 441 EUSTIS FL 32726	352-357-4999	barbara.cosden@suntrust.com
RICHARD WENTZEL	FLORIDA HOUSING	285 E. STW ST. HOPKINS, FL	407 886-2851	WENTZEL@FLHHS.org
Cheryl Howell	Lake County Housing			
Barnett Schwartzman	Procurement			

AHBL



By this addendum 1, Part 2 of the Scope of Work originally included in Section 2 of RFP 12-0203 is hereby revised and replaced in its entirety by the following revised Part 2:

## **2. Educational program and requirements.**

Homebuyer classes will begin Jan. 1, 2012 and each qualified organization will be expected to conduct at least eight (8) classes during 2012, and a minimum of eight (8) classes per calendar year, thereafter. Classes may be held more frequently at the discretion of the presenter; however, calendars shall be supplied to the County. Each class shall consist of two modules as follows:

Home Buyer Module: Total contact time shall be at least six (6) hours for the home purchase module. **Each homebuyer class shall be taught by a homebuyer counselor certified through the U.S. Department of Housing and Urban Development or Neighborworks America, Inc.** It shall be the responsibility of the counselor to ensure that all credentials remain current. Subject matter to be covered in the Home Buyer Module shall include, but not be limited to:

- Overview of the home buying process
- Lake County Home Purchase program and other housing assistance (Bond money, etc.)
- Types of mortgages available and FHA
- Predatory lending and foreclosure prevention
- Escrow accounts (taxes, insurance)
- Mortgage insurance
- Basic Underwriting Readiness
- Hints on shopping for a home (what to look for in the neighborhood)
- Fair housing
- Homeowners Association fees and deed restrictions
- Energy efficiency
- Flood insurance

Home Maintenance Module: Total contact time shall be at least five (5) hours for the home maintenance module. Participants may include rehabilitation and emergency repair clients not associated with a public sector-supported home purchase program. Specific billing directions for these specific participants (who will be identified via specific referral) are provided in section 4 of this scope of work. Subject matter covered shall include but not be limited to:

- Home inspections to determine maintenance needs
- Routine care of electrical, HVAC and plumbing systems
- Termite protection and pest control
- Purchase and care of appliances
- Caring for interior surfaces and cleaning
- Caring for yard and exterior surfaces
- Neighborhood environment and safety
- Home repairs (contracting vs. doing it yourself, mildew prevention, painting, plumbing, repairing screens and windows.)
- Money management for homeowners (financial responsibility, preventing foreclosure, tax deductions, homestead exemption, homeowners insurance, records and important papers, energy conservation)

The presenting organization shall be responsible for procuring venues around the County to hold the classes. The insurance requirement stated in provision 1.8 of this RFP applies if the vendor arranges for use of a County facility in this regard.

Syllabuses for both classes shall be preapproved by the County. A draft syllabus for each class is to be provided after award in sufficient time to enable County review and comment, and any associated vendor revision, at least two (2) weeks prior to the first class presentation. Power point presentations and other visual aids shall be used in presenting the abovementioned subject matter. Each household attending shall receive one (1) set of reference materials, regardless of how many adults attend the classes. The cost of producing the materials shall be the responsibility of the presenter.

The classes shall be made available free of charge to qualified clients, but attendance is limited to households who have been pre-screened and are mortgage ready. All adults whose name will be on the mortgage must attend; other adults living within the same residence may also attend. The classes may be repeated one or more times at no additional cost to the homebuyer or the County, and may be attended on separate dates. At the end of each class every participant has the option of completing a course evaluation form prepared by the County.

The presenting organization shall be responsible for taking roll and submitting each roster to the County. The roster and course evaluation forms shall be returned to the County within two (2) business days from the date of the class.

The County will monitor the classes held by each qualified organization at least annually to ensure that the required material is being covered. The County reserves the right to monitor at any time without prior notice.